Web Client Overview

The Web Client is a Web-based document management system. You can use the Web Client to easily upload, organize, and retrieve documents.

The Web Client's graphical interface provides a point-and-click environment for fast and simple navigation.
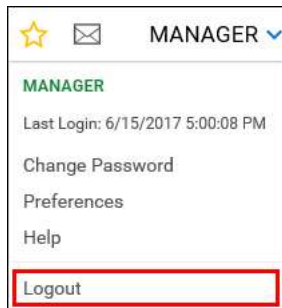
Logging On and Logging Off

1. Access the Web Client logon website.
2. In the **User Name** field, enter your user name.
3. In the **Password** field, enter your password.
4. Click the **Login** button or press **Enter**.

   The Web Client interface is displayed.

 To log off of the Web Client:
1. Click the User Menu drop-down select menu next to your user name.
2. Select **Logout**:

Accessing the End-User Help Files

The Web Client includes help files for end-users. These can be referenced at any time in the Web Client either by pressing the **F1** keyboard button, or by clicking **Help** in the User Menu drop-down select menu:
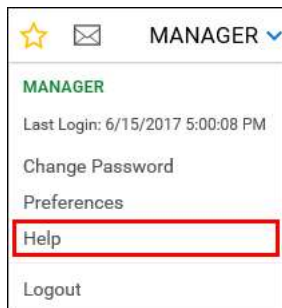

The help files are opened in a separate window. To open the Web Client help, click **Web Client** from the navigation pane on the left side of the new help files window.

You can also open help files for different OnBase modules that use the Web Client. Simply click the name of the module for which you want to view help.

Navigating the Web Client

The **Main Menu** allows you to access the various modules and functions available to you in the Web Client. The default position of the Main Menu button is the upper left side of your screen.

The options that are available in the Main Menu are determined by your system administrator.
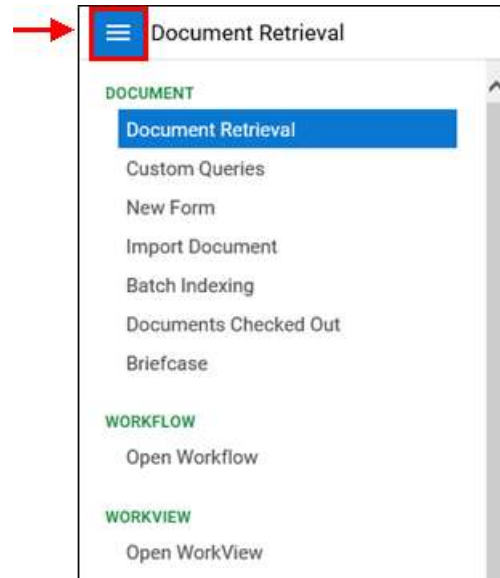
The **Navigation Panel** provides options for working with documents in OnBase. The Document Retrieval option is displayed by default when you log into the Web Client, but the Navigation Panel changes when you select different options in the Main Menu.
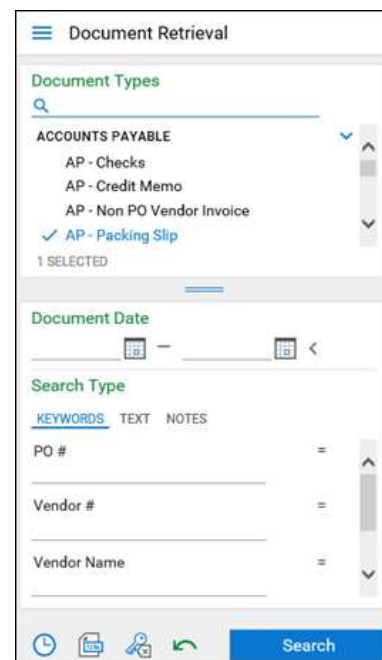
Adding Favorites

You can add the currently displayed context to your list of favorites:

1. Click the **Favorites** button:
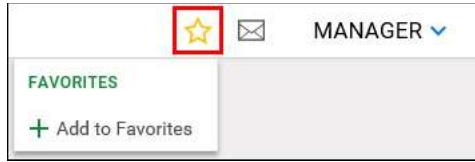
2. Click **Add to Favorites**.
3. Enter a name for the new favorite and click **OK**.

   The favorite can be accessed by clicking the **Favorites** button again and selecting the favorite from the list.

Document Retrieval

You can retrieve documents in the Web Client based on the document's keyword values, the text contained within the document, or the note information contained on a document. The following example describes how to retrieve documents based on their keyword values.

To access Document Retrieval mode:

1. Click the Main Menu list and select **Document Retrieval** in the Document group.
2. Select a **Document Type**.

Note: The information contained in the panel may dynamically change, based on the Document Type Group or Document Type you select.

3. If desired, you can specify a date range to return only documents that were created or imported between a certain range of dates.
4. Click the **Keywords** tab:
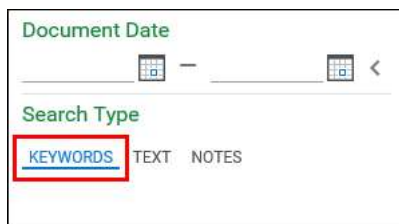
   A list of keyword fields is displayed below.

5. Enter values for the keywords that are displayed. You can enter as much or as little information as you know.

Note: Some searches require you to enter at least one keyword value. Search requirements are determined by your system administrator.

6. When you have entered all search criteria, click the **Search** button at the bottom of the panel:

Document Retrieval (Continued)

The results of your search are displayed in a list on the right side of the screen.
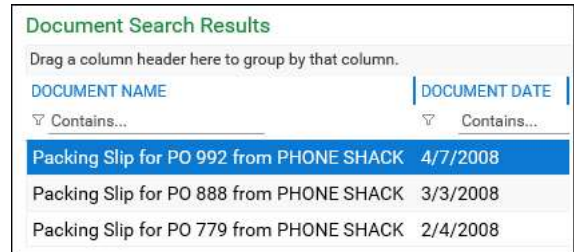

7. Double-click a document in the list to open it. The document is displayed in the area below the list.

Importing Documents

To import documents in the Web Client:

1. Click the Main Menu list and select **Import Document** from the **Document** group.

   The indexing panel is displayed.

2. Select the document you want to import by doing one of the following actions:
   - Browse to the file location of the document you are importing by clicking the **Browse...** button, or
   - Drag and drop the file you want to import into the empty space next to the indexing panel:
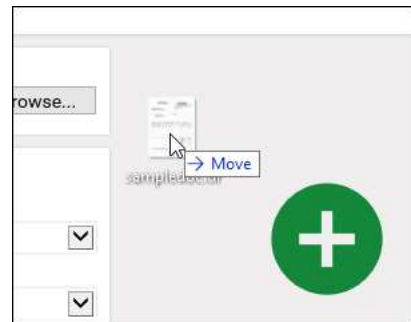
   A green plus icon is displayed in the empty space, indicating that the file can be dropped here for import.

   When you are finished adding a file, it is added to the **Document Queue**, and assigned a status of **Pending Import**.

3. Select a **Document Type Group** for the document.

   Select a **Document Type** for the document.

4. Enter all of the necessary keyword values in each field.
5. When you are finished entering the necessary keyword values, click the **Import** button to import the document into OnBase:

   When the document is finished importing, the status **Imported Successfully** is displayed.

Batch Indexing

To index a batch of documents in the Web Client:

1. Click the Main Menu list and select **Batch Indexing** in the **Document** section.

   The **Batch Statuses** panel is displayed.

2. Under **Batch Statuses**, select a batch status queue.

   A list of available batches displays to the right.

3. Right-click the queue with the documents you want to index and select **Index Documents**.

   The batch is retrieved and the first unindexed document is displayed in the document viewer. As you index each document, each additional unindexed document is displayed in the viewer.

4. In the indexing panel, select a **Document Type** for the document.

   A list of keyword fields is displayed below.

5. Enter values for the keywords that are displayed. You can enter as much or as little information you know.

   If you are indexing multiple documents, click the **Next Document** arrow to navigate to the next document.

   You can navigate between different documents in a batch by using the following navigation buttons:

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6. When you are finished indexing documents, click the **Index Documents** button in the indexing toolbar:

   The batch of documents is indexed and saved to the queue.

Note: When the batch is saved, the indexing status may change. For example, if you index a few documents in an **Awaiting Index** batch and then save the batch, the status is changed to **Index In Progress**.